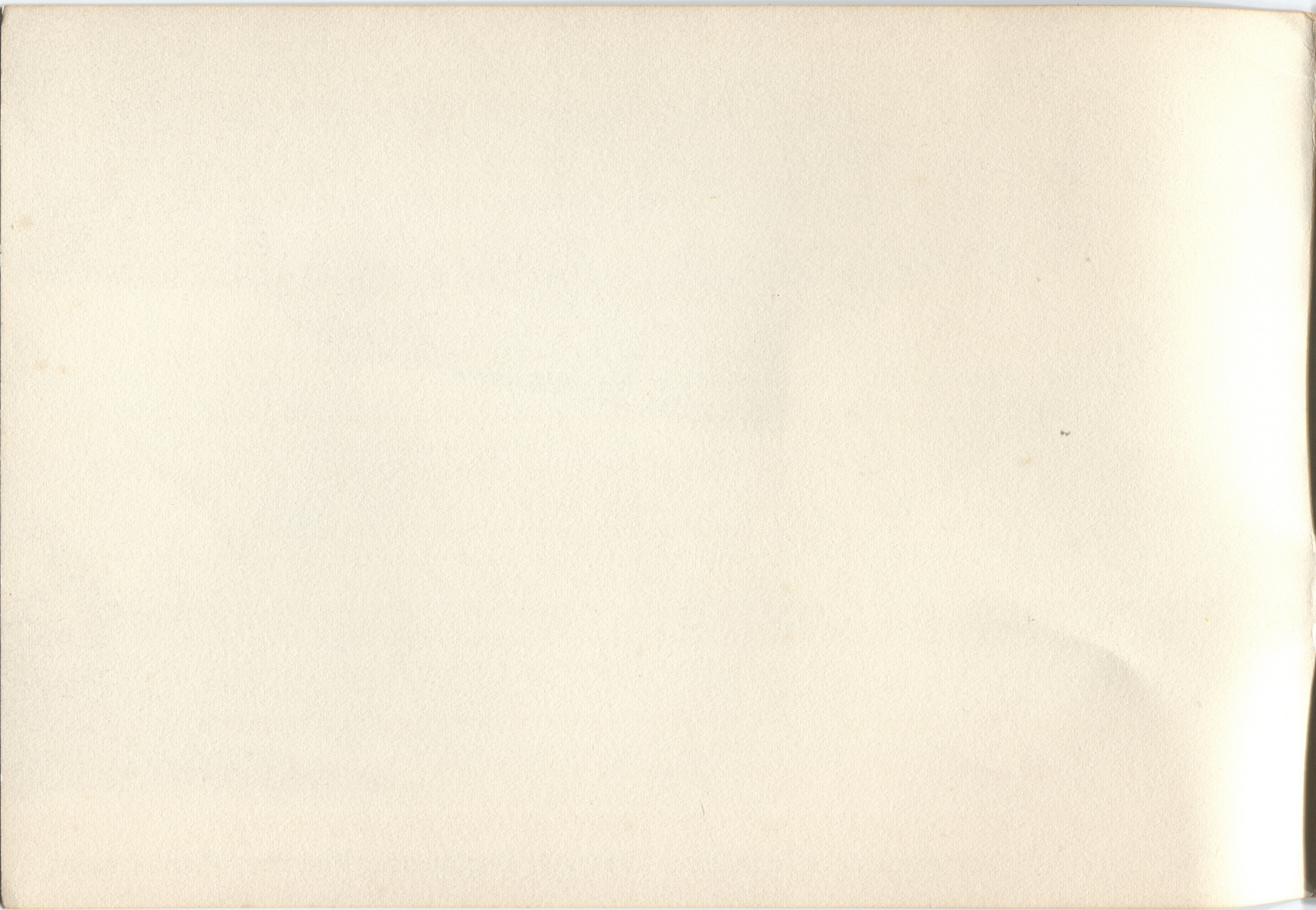


IBM

The concept of Individual Customer Engineering Territory Management



What is this concept?

Successful territory management is . . . to have and exercise the authority, accountability and responsibility necessary to insure a smooth running successful territory operation.

Isn't this the concept I have always held in operating my territory?

To a degree, we have all tried to operate under this concept, however, the tools to fully operate as a successful territory manager have not been available.

What tools will I now receive?

1. Mechanism code report: time distribution by product by mechanism. A monthly report showing a breakdown of the previous month's calls showing total calls and total time spent on mechanisms by product. In cases where the processing center's equipment can provide it, this report will also show average actual time per mechanism by product.
2. MSPR report: the time distribution by product by service code. You will receive this report monthly, which is a breakdown of the previous month's calls, showing the time distribution and number of calls by service code by product.
3. Assistance received and rendered: a monthly listing of assistance rendered, showing time, number of calls, and territories where this assistance was given and also the total amount of assistance that you have received.



Electric Typewriter Division

CE JOHN DOE

201

ET Customer Engineering Activity Report

JANUARY
MonthMonthly Summary & Parts Recovery 479
B/O No.

Service Required by Serial _____

MSPR by CE _____

Individual Evaluation by CE

Mech. Code X Rec'd/Rendered _____

| month | | | B/O No. | | | | | | | | | | | | | | | | | | |
|----------------------|-----------|-----|---------|--------|----------|--------------|----------|-------------|------------|---------------|---------|-------------------------------|----------------------------|---------------------|------------------|-----------------|-------------|------|-----------|--------------------|--|
| CUSTOMER INVOICE NO. | IBM DEPT. | LOC | MODEL | SERIAL | SVC. CD. | NUMBER CALLS | MEC. CD. | TRAVEL HRS. | TOTAL HRS. | OVERTIME HRS. | EXPENSE | NON-BILLABLE RECOVERABLE PTS. | NON-BILLABLE TYPE-ELEMENTS | BILLABLE LABOR AMT. | OTHER TERR. WKD. | OTHER OFF. WKD. | TERR. ASGD. | DATE | CE SERIAL | AVG. TIME PER CALL | |
| | | | 1 | | | 22 | 01 | 4.6 | 13.8 | | | | | | | | | | | .42 | |
| | | | 1 | | | 4 | 02 | 2.6 | 4.8 | | | | | | | | | | | .55 | |
| | | | 1 | | | 31 | 03 | 4.4 | 19.9 | | | | | | | | | | | .50 | |
| | | | 1 | | | 13 | 06 | 2.6 | 8.4 | | | | | | | | | | | .45 | |
| | | | 1 | | | 4 | 10 | .6 | 1.8 | | | | | | | | | | | .30 | |
| | | | 1 | | | 25 | 11 | 2.6 | 12.9 | | | | | | | | | | | .41 | |
| | | | 1 | | | | | | | | | | | | | | | | | | |

| | | | | | | | | | | | | | | | | | | | | | | |
|--|--|--|--|---|--|--|----|----|-----|------|--|--|--|--|--|--|--|--|--|--|--|-----|
| | | | | 6 | | | 1 | 78 | .4 | 1.2 | | | | | | | | | | | | .8 |
| | | | | 7 | | | 12 | 01 | 1.6 | 10.4 | | | | | | | | | | | | .73 |
| | | | | 7 | | | 10 | 11 | 2.1 | 7.6 | | | | | | | | | | | | .55 |
| | | | | 7 | | | 16 | 21 | 2.2 | 16.8 | | | | | | | | | | | | .91 |
| | | | | 7 | | | 4 | 22 | .6 | 2.6 | | | | | | | | | | | | .50 |
| | | | | 7 | | | 25 | 23 | 4.6 | 24.2 | | | | | | | | | | | | .78 |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |



Electric Typewriter Division

CE JOHN DOE 201

ET Customer Engineering Activity Report

JANUARY

Month

Monthly Summary & Parts Recovery

479

Service Required by Serial

Individual Evaluation by CE
MSPR by CE X Mech. Code Rec'd/Rendered

B/O No.

| CUSTOMER INVOICE NO. | IBM DEPT. | LOC. | C SWAF | MODEL | SERIAL | SVC. CD. | NUMBER CALLS | MEC CD. | TRAVEL HRS. | TOTAL HRS. | OVERTIME HRS. | EXPENSE | NON- BILLABLE RECOVERABLE PTS. | NON- BILLABLE TYPE- ELEMENTS | BILLABLE LABOR AMT. | OTHER TERR. WKD. | OTHER OFF. WKD. | TERR. ASGD. | DATE | CE SERIAL | AVG. TIME PER CALL |
|-------------------------|--------------|------|-----------|-------|--------|-------------|-----------------|------------|-------------|------------|------------------|---------|---|---------------------------------------|---------------------------|------------------------|-----------------------|----------------|------|--------------|-----------------------------|
| | | | | 1 | 1 | 01 | 11 | | 2.2 | 8.2 | | | | | | | | | | | |
| | | | | | | 03 | 3 | | .5 | 2.0 | | | | | | | | | | | |
| | | | | | | 07 | 62 | | 8.2 | 41.6 | | | | | | | | | | | |
| | | | | | | 09 | 90 | | 12.6 | 63.0 | | | | | | | | | | | |
| | | | | | | 12 | 8 | | .9 | 4.8 | | | | | | | | | | | |
| | | | | | | 32 | 8 | | 1.4 | 4.3 | | | | | | | | | | | |
| | | | | | | 14 | 1 | | | | | | | | | | | | | | |
| | | | | 1 | 7 | 01 | 4 | | 1.2 | 3.2 | | | | | | | | | | | |
| | | | | | | 07 | 10 | | 1.1 | 5.0 | | | | | | | | | | | |
| | | | | | | 09 | 12 | | .6 | 7.2 | | | | | | | | | | | |
| | | | | | | 12 | 3 | | .4 | 1.5 | | | | | | | | | | | |
| | | | | | | 32 | 4 | | .6 | 2.4 | | | | | | | | | | | |
| | | | | 2 | 1 | 05 | 3 | | .1 | 1.5 | | | | | | | | | | | |
| | | | | | | 47 | 2 | | | 1.0 | | | | | | | | | | | |
| | | | | 5 | | 07 | 3 | | .6 | 2.1 | | | | | | | | | | | |
| | | | | 9 | | 75 | 2 | | | 2.4 | | | | | | | | | | | |
| | | | | 9 | | 83 | 1 | | | 4.0 | | | | | | | | | | | |
| | | | | | | | | | TOTAL | 160.0 | | | | | | | | | | | |



ET Customer Engineering Activity Report

JANUARY
Month

Monthly Summary & Parts Recovery

479

Service Required by Serial

MSPR by CE Individual Evaluation by CE
Mech. Code Rec'd/Rendered X

B/O No.

[illegible]

4. Complete territory list: you will receive this accurate listing every three months. This will be alphabetical by customer of all equipment in your territory. It will also show the total of all installed equipment by product by status, the monthly inspection workload distribution, and the correct individual annual billing amount for all of your M/A machines.
5. High service units report: weekly listing of all machines in your territory that in the previous week have received three or more calls in the past 60 days.

IBM Electric Typewriter Division

 BRANCH OFFICE 479

 TERRITORY 201
Equipment Installed

ZONE _____

 DATE JANUARY

| INST. | STATUS | CUSTOMER | LOCATION | CUSTOMER NUMBER | PROD CD. | MODEL | SERIAL | BL NO. | YR. MFG. | BL. AMT. | CE TERR. | DIS CD | SP EQP | INSP SCHEDULE | ZONE | DATE INST | BR. OFF. USE |
|-------|--------|--------------------|------------------|--------------------|-------------|---------------------|-------------------------|-----------|-----------------------|----------|----------|------------|-----------|------------------|------|--------------|--------------|
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 6 | 214 | 109361 | 12 | | 3100 | | 1 | | 3-7-11 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 6 | 212 | 113537 | 12 | | 2850 | | 1 | | 3-7-11 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 1 | 11 | 640334 | 12 | | 6000 | | 1 | 8 | 3-7-11 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 1 | 11 | 665537 | 12 | | 6000 | | 1 | 8 | 3-7-11 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 1 | 81 | 1567601 | 12 | | 3500 | | 1 | | 4-8-12 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 1 | 81 | 1567602 | 12 | | 3500 | | 1 | | 3-7-11 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 2 | 721 | 4044832 | 12 | | 3500 | | 1 | | 3-7-11 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 2 | 721 | 4056241 | 12 | | 3500 | | 1 | | 3-7-11 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 2 | 725 | 4355621 | 12 | | 3500 | | 1 | | 3-7-11 | | | |
| 4 | | AMERICAN COUNCIL | 305 E. 43 STREET | | 2 | 725 | 4362621 | 12 | | 3500 | | 1 | | 3-7-11 | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 41 | 50848 | 7 | | 3950 | | | | 2-6-10 | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 11 | 128441 | 7 | | 3500 | | | | 2-6-10 | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 11 | 172513 | 7 | | 3500 | | | | 2-6-10 | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 11 | 331844 | 7 | | 3500 | | | | 2-6-10 | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 11 | 429338 | 7 | | 3500 | | | | 2-6-10 | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 11 | 430536 | 7 | | 3500 | | | | 2-6-10 | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 81 | 1272711 | 7 | | 3500 | | | | 2-6-10 | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 41 | 2092567 | 7 | | 3950 | | | | 2-6-10 | | | |
| 5 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 41 | 2103069 | | | | | | | | | | |
| 4 | | CARNEGIE ENDOWMENT | 345 E. 46 STREET | | 1 | 41 | 2142658 | 7 | | 3950 | | | | 2-6-10 | | | |
| | | | <u>TOTAL</u> | <u>WARRANTY</u> | <u>M/A</u> | <u>PER CALL</u> | <u>SELF SERVICE</u> | <u>A</u> | <u>SCHEDULE B</u> | <u>C</u> | | <u>M/A</u> | | | | | |
| | | ET | 533 | 12 | 440 | 81 | 16 | 116 | 104 | 118 | 102 | 84.4 | | | | | |
| | | DE | 50 | 0 | 42 | 8 | - | 11 | 14 | 9 | 8 | 84.0 | | | | | |
| | | SE | 33 | 3 | 24 | 6 | - | 6 | 4 | 8 | 6 | 80.0 | | | | | |
| | | TOTAL | 616 | 15 | 506 | 95 | 16 | 133 | 122 | 135 | 116 | | | | | | |

IBM Electric Typewriter Division

FOR _____
FIELD MGR., TERR. SUPERVISOR

WEEK ENDING March 7, 1964

479

BRANCH OFFICE

High Service Units Report

[illegible]

You mentioned an accurate territory list. Is this possible?

Hell no!

Yes! With the use of the permanent change request page in the new call record book, an auditable control and responsibility can now be applied to territory list change requests, insuring an accurate list.

How can I use these reports to successfully manage my territory?

Good question! Just supplying each of you with these reports will not make you a successful territory manager. It is the use you make of them that will determine how successful a territory manager you will become.

- Let us look at the complete territory listing.

Besides giving you and your manager the total number of machines by status for which you are responsible, this report will be the means of establishing a balanced inspection workload, and also to insure that machines are scheduled by customer to make the most efficient use of inspection time. An example of this would be a 10 machine M/A account where one machine was on a different inspection schedule than the others. An efficient operation demands that in this case all inspection schedules be the same. Also, a similar situation where in a 10 machine account 9 are on M/A and one is on per call. There may be a logical reason for this, but it could be an oversight and follow-up is necessary.

The territory list will also show the exact M/A charge for each machine on M/A. This will enable you to check this charge against the machine specifications to insure correct M/A billing charges.

In summary, correct use of this list will show and insure the most efficient inspection scheduling, per call machines that are potential M/A machines and the maximum financial return from Maintenance Agreements.

- The time distribution by product by service code report will show your 07-09 time relationship, code 32 activity. 83 and 85 time and your 01-37 time.

Getting this report monthly will allow you to develop time trends, showing areas where improvement has been made, and areas where improvement is necessary. Average actual 09 time per inspection can be calculated and will show whether enough 09 time is being spent per inspection, and also if you feel the inspection you are doing justifies the time being spent.

- The time distribution by product by mechanism will show you what mechanism you are spending your time on. High time mechanism can be analyzed by you to determine whether the time is high because you are doing a quality job, or because of your lack of understanding of the mechanical workings and adjustments. In the future, national actual time per mechanism averages can be established. Then you can see month to month not only your own trends, but also how you compare to the national averages.



- The assistance received and rendered report will allow you to evaluate your territory in regards to workload. If you have a good territory operation and are continually rendering more assistance than receiving, your territory can be increased, or proper credit given you. If the reverse is true and you are receiving more assistance than you are giving, it would indicate your territory workload is too great, and a territory decrease is necessary.

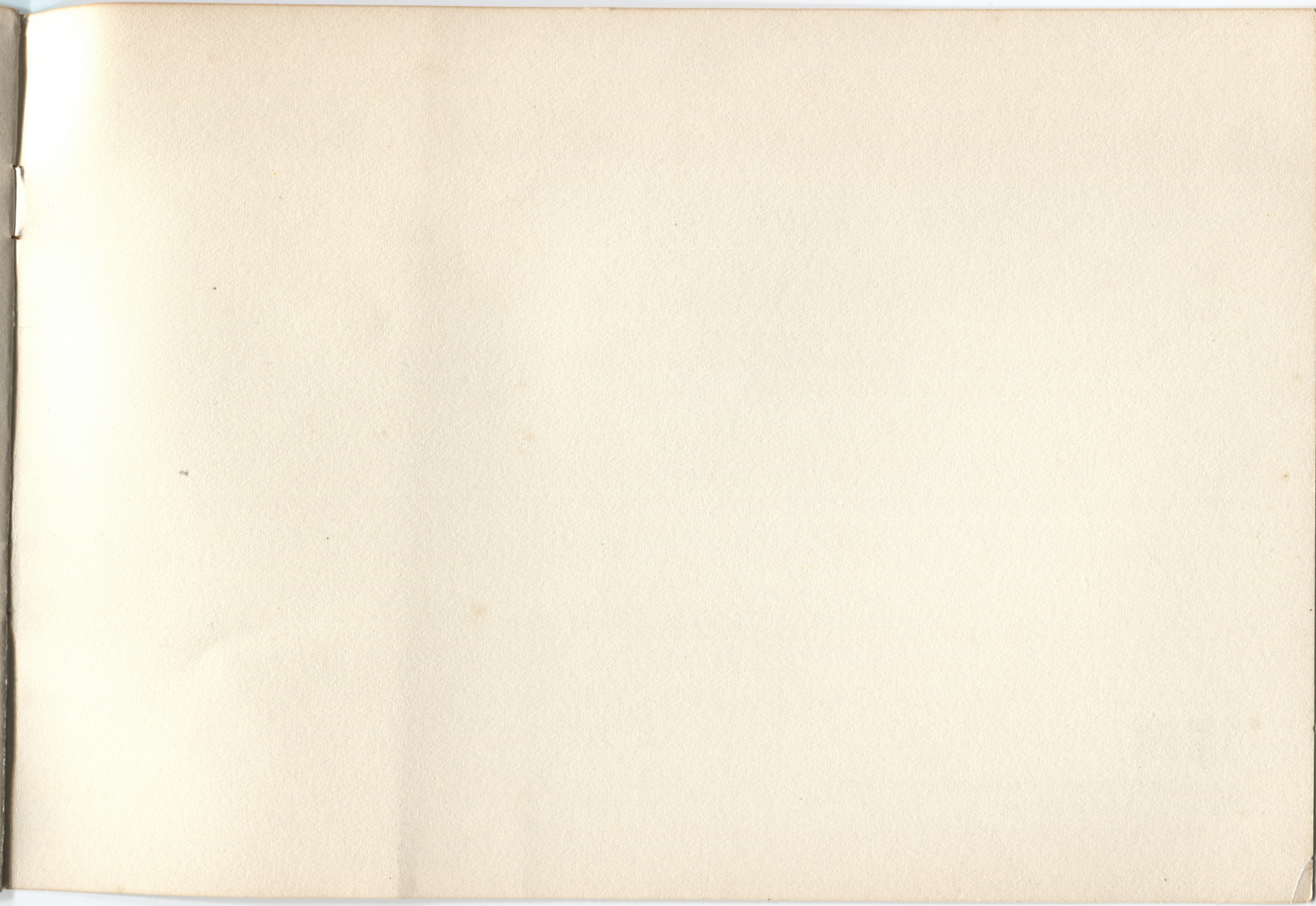
- The high service unit report is a weekly recap from your previous week's call record book. It lists all machines that have had three or more calls in the past 60 days. Although your CE Manager has the ultimate responsibility for complete customer satisfaction for service, you as the CE and a Territory Manager have a responsibility also. For this reason, this report will be furnished to both you and management.

Your personal knowledge of each situation can then be given to your manager to assist him in making a proper evaluation and decision. The proper use of this report will insure a territory with a high degree of customer satisfaction, and will reflect your territory management ability.

You have to bear in mind that the recommendations made here for the use of these tools are basic. We are certain that lots of you will find additional uses to which you as individuals will put these tools to work.

Sounds good!!

This concept presents a new challenge to my job as a Customer Engineer.
A challenge that is welcome, stimulating and obviously rewarding. I feel that
I am going to become the successful Territory Manager.



IBM
®

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Electric Typewriter Division
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